

APR 25 2023

UNITED STATES HOUSE OF REPRESENTATIVES

Form A
For Use by Members, Officers, and Employees

2021 FINANCIAL DISCLOSURE STATEMENT

LEGISLATIVE RESOURCE CENTER
(Office Use Only)

RECEIVED - APR 25 11:00

Name: Fred Upton

Daytime Telephone

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>MI</u> District: <u>6</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____	Staff Filer Type: (If Applicable) Shared <input type="checkbox"/> Principal Assistant <input type="checkbox"/>
REPORT TYPE	<input type="checkbox"/> 2021 Annual (Due: May 16, 2022)	<input type="checkbox"/> Amendment	<input checked="" type="checkbox"/> Termination	Date of Termination: <u>1-3-23</u>	

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent child: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period for the purpose of obtaining or influencing the award of a contract?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent child purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent child receive any reportable gift(s) totaling more than \$415 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$415 in value from a single source during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	I. Did any individual or organization make a donation to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Upden

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BLOCK A

Assets and/or Income Sources

Identify (a) each asset held for investment or production of income and with a fair market value exceeding \$1,000 at the end of the reporting period, and (b) any other reportable asset or source of income that generated more than \$200 in "unearned" income during the year.

Provide complete names of stocks and mutual funds (do not use only ticker symbols).

For all IRAs and other retirement plans (such as 401(k) plans) provide the value for each asset held in the account that exceeds the reporting thresholds.

For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.

For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state.

For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.

Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.

If you report a privately-traded fund that is an Excepted Investment Fund, please check the "EIF" box.

If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC), or jointly held with anyone (JT), in the optional column on the far left.

For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.

BLOCK B

Value of Asset

Indicate value of asset at close of the reporting period. If you use a valuation method other than fair market value, please specify the method used.

If an asset was sold during the reporting period and is included only because it generated income, the value should be "None."

Column M is for assets held by your spouse or dependent child in which you have no interest.

BLOCK C

Type of Income

Check all columns that apply. For accounts that generate tax-deferred income (such as 401(k), IRA, or 529 accounts), you may check the "Tax-Deferred" column. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if the asset generated no income during the reporting period.

BLOCK D

Amount of Income

For assets for which you checked "Tax-Deferred" in Block C, you may check the "None" column. For all other assets indicate the category of income by checking the appropriate box below. Dividends, interest, and capital gains, even if reinvested, must be disclosed as income for assets held in taxable accounts. Check "None" if no income was earned or generated.

Column XII is for assets held by your spouse or dependent child in which you have no interest.

BLOCK E

Transaction

Indicate if the asset had purchases (P), sales (S), or exchanges (E) exceeding \$1,000 in the reporting period.

If only a portion of an asset was sold, please indicate as follows: (S (part)).

Leave this column blank if there are no transactions that exceeded \$1,000.

SP, DC, JT			SP	DC	JT	None	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
Examples:			Simon & Schuster																SP(part)	
			ABC Hedge Fund																	
STW Pat. Credit LLC Accts																				
ST 5 th 3 rd Bank Accts																				
ST U.S. Fed. C. Thrift Acct																				
ST JP Morgan checking Acct																				
ST Peps																				
ST Baird cash & bank T																				

the account that exceeds the reporting thresholds.

For bank and other cash accounts, total the amount in all interest-bearing accounts. If the total is over \$5,000, list every financial institution where there is more than \$1,000 in interest-bearing accounts.

For rental and other real property held for investment, provide a complete address or description, e.g., "rental property," and a city and state.

For an ownership interest in a privately-held business that is not publicly traded, state the name of the business, the nature of its activities, and its geographic location in Block A.

Exclude: Your personal residence, including second homes and vacation homes (unless there was rental income during the reporting period); and any financial interest in, or income derived from, a federal retirement program, including the Thrift Savings Plan.

If you report a privately-traded fund that is an Excepted Investment Fund, please check the "EIF" box.

If you so choose, you may indicate that an asset or income source is that of your spouse (SP) or dependent child (DC) or jointly held with anyone (JT), in the optional column on the far left.

For a detailed discussion of Schedule A requirements, please refer to the instruction booklet.

Leave this column blank if there are no transactions that exceeded \$1,000.

Follow: (S) (part)

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction	
SP, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E
	<i>None</i>																																		
	<i>Beaton-Dickinson</i>																																		
	<i>Cherry</i>																																		
	<i>Coca Cola</i>																																		
	<i>Costco</i>																																		
	<i>CBS Health</i>																																		
	<i>Danaher</i>																																		
	<i>Elmad</i>																																		
	<i>Hewlett</i>																																		
	<i>Intercontinental Edco</i>																																		
	<i>Johnson City</i>																																		
	<i>JP Morgan</i>																																		
	<i>Mohrman LLC</i>																																		
	<i>McKesson</i>																																		
	<i>Meta Platforms</i>																																		
	<i>Meta Platforms ODF</i>																																		
	<i>Microsoft</i>																																		
	<i>Moody's</i>																																		
	<i>Novartis Southern</i>																																		

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Upstar

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income												BLOCK E Transaction		
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part), or E	
	None																																			
	\$1-\$4,000																																			
	\$1,001-\$15,000																																			
	\$15,001-\$50,000																																			
	\$50,001-\$100,000																																			
	\$100,001-\$250,000																																			
	\$250,001-\$500,000																																			
	\$500,001-\$1,000,000																																			
	\$1,000,001-\$5,000,000																																			
	\$5,000,001-\$25,000,000																																			
	\$25,000,001-\$50,000,000																																			
	Over \$50,000,000																																			
	Spouse/DC Asset over \$1,000,000*																																			
	None																																			
	DIVIDENDS																																			
	RENT																																			
	INTEREST																																			
	CAPITAL GAINS																																			
	EXCEPTED/BLIND TRUST																																			
	TAX-DEFERRED																																			
	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)																																			
	None																																			
	\$1-\$200																																			
	\$201-\$1,000																																			
	\$1,001-\$2,500																																			
	\$2,501-\$5,000																																			
	\$5,001-\$15,000																																			
	\$15,001-\$50,000																																			
	\$50,001-\$100,000																																			
	\$100,001-\$1,000,000																																			
	\$1,000,001-\$5,000,000																																			
	Over \$5,000,000																																			
	Spouse/DC Asset with income over \$1,000,000*																																			

SP Trust holdings
Mortgage & Dividends
are controlled by ownership
I have no holdings
I have

70th value:
compared to:
Cable/STPreg. H. H. H.
Abbott
Advanced Place Day
Fidelity 500 Index
JPM Equity - JPM
SPDR S&P 500 SPY
Vanguard
Sir Charles
Action Int APH
Fidelity Intl 7500
Echelon M&I 6500
T. Shares M&I 6500
JPM B&H 6500
Sir Charles Int 6500
JPM B&H 6500

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SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name:

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BLOCK A Assets and/or Income Sources		BLOCK B Value of Asset													BLOCK C Type of Income							BLOCK D Amount of Income											BLOCK E Transaction	
SP, DC, JT	ASSET NAME	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED/BLIND TRUST	TAX-DEFERRED	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	P, S, S(part), or E
	<i>JP Mofor</i>																																	
	None																																	
	\$1-\$1,000																																	
	\$1,001-\$15,000																																	
	\$15,001-\$50,000																																	
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	\$5,000,001-\$25,000,000																																	
	\$25,000,001-\$50,000,000																																	
	Over \$50,000,000																																	
	Spouse/DC Asset over \$1,000,000*																																	
	None																																	
	DIVIDENDS																																	
	RENT																																	
	INTEREST																																	
	CAPITAL GAINS																																	
	EXCEPTED/BLIND TRUST																																	
	TAX-DEFERRED																																	
	Other Type of Income (Specify: e.g., Partnership Income or Farm Income)																																	
	None																																	
	\$1-\$200																																	
	\$201-\$1,000																																	
	\$1,001-\$2,500																																	
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	\$100,001-\$1,000,000																																	
	\$1,000,001-\$5,000,000																																	
	Over \$5,000,000																																	
	Spouse/DC Asset with Income over \$1,000,000*																																	
	P, S, S(part), or E																																	
	Valued Tax-Exempt IRAs																																	
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SCHEDULE B - TRANSACTIONS

Name:

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent child, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

Column K is for assets held by your spouse or dependent child.

SP, DC, JT

SP	Example	Type of Transaction	Purchase	Sale	Partial Sale	Exchange	Check Box if Capital Gain Exceeded \$200	Date (MM/DD/YY) or Quarterly, if applicable	Amount of Transaction											
									A	B	C	D	E	F	G	H	I	J	K	
	Example Mega Corp Stock				X			3/6/21		X										
JT	Under Armour			X				10/3/12	X											
JT	U.S. Treas Sec's S-T 10		X					11/3/12							X					
JT	Baird 1st Trust # mkt			X				10/14/22				X								
	College Savings Plan																			
	MSA9 Adv/Baird		X					7/1/22			X									
	Schedule with the to Fund																			
	accounts)																			
	These Transactions done by																			
	Northern Trust wife																			
	control as directed by me																			
	Walt Disney			X				4/14/22	X											
	Alphabet CLA			X				4/14/22	X											
	Meta Platforms			X				4/29/22	X											
	Meta Platforms			X				12/1/22	X											
	Meta Platforms		X					10/3/22	X											
	Nvidia		X					6/29/22	X											

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SCHEDULE B - TRANSACTIONS

Name:

Up to

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent child, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.		Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date	Amount of Transaction												
SP, DC, JT	SP	Example	Asset	Purchase	Sale		Partial Sale	Exchange	(ACQ/INT) or Quantity Monthly, or Bi-weekly, if applicable	A \$1,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
		<i>These T.P. Rogers Transactions done in Trust not managed or directed by me - I have no ownership in their values.</i>																		
		<i>Comcast Stocks</i>		X																
		<i>Airtel</i>			X															
		<i>Sage</i>			X															
		<i>Shopify</i>			X															
		<i>Deere</i>		X																
		<i>PPG Ind.</i>			X															
		<i>Progressive</i>		X																
		<i>Ameren Corp</i>		X																
		<i>Ester Lander</i>			X															
		<i>Norfolk Energy</i>			X															
		<i>Schubert</i>			X															
		<i>Monster Books</i>		X																
		<i>Raytheon</i>		X																

SCHEDULE B - TRANSACTIONS

Name: Wafar

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction.

Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A.

* Column K is for assets solely held by your spouse or dependent child.

SP, DC, JT

Asset

SP Example Mega Corp. Stock

JP Mega Transactions																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
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Amount of Liability

[illegible]

Report all positions, compensated or uncompensated, held during the current or prior calendar year as an officer, director, trustee of an organization, partner, proprietor, representative, employee, or consultant of any corporation, firm, partnership, or other business enterprise, nonprofit organization, labor organization, or educational or other institution other than the United States. Exclude: Positions held in any religious, social, fraternal, or political entities (such as political parties and campaign organizations); and positions solely of an honorary nature.

Position	Name of Organization
Chairman	Upton Asset Mgt.
General Counsel	SEE limited Partnership
Trustee	SEE limited Partnership
Trustee	EVUE LLC (Family members)
Tenant's Counsel	UPS N Dorcas, DV LLC
Board Member	S. Co. Michigan First (resigned 12/22)

Identify the source and list travel itinerary, dates, and nature of expenses provided for travel and travel-related expenses totaling more than \$415 received by you, your spouse, or your dependent child during the reporting period. Indicate whether a family member accompanied the traveler at the sponsor's expense. Disclosure is required regardless of whether the expenses were paid directly by the sponsor or were paid by you and reimbursed by the sponsor.

EXCLUDE: Travel-related expenses provided by federal, state, and local governments, or by a foreign government required to be separately reported under the Foreign Gifts and Decorations Act (FGDA, 5 U.S.C. § 7342); political travel that is required to be reported under the Federal Election Campaign Act; travel provided to a spouse or dependent child that is totally independent of his or her relationship to the filer.

[illegible]